

YOU Can Easily Make a Difference for Jessica's House Hospice (JHH)



I Deferred Giving Options

JHH's Mission is to provide compassionate, high-quality care for residents from the time of diagnosis through their palliative and end-of-life journey.

Ensure the future of JHH with gifts in your Will and by bequest.

Pages 2-3



II Gifts for Your Family and JHH

JHH's vision is to create a 'home away from home' for residents and their loved ones when end-of-life care is needed.

Provide for your loved ones in addition to JHH with a gift of life insurance.

Page 3

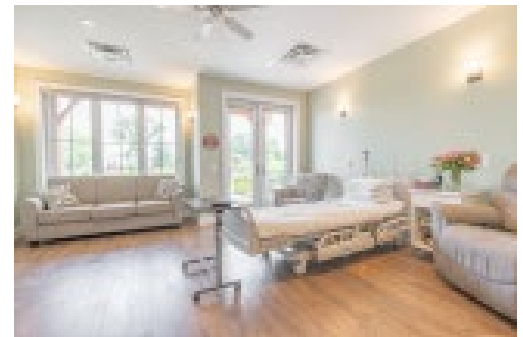


III More Common Gifting Opportunities

JHH provides a holistic approach to care by following a philosophy of ensuring patient-centered care at all times

Secure JHH's future with gifts in memory or in tribute to a loved one. Or from your donor-advised funds.

Pages 3-5





Deferred Giving Options

You can show your support for Jessica's House Hospice today by including JHH in your Will. It costs you nothing now, but your legacy will be felt for generations.

After providing for your family, won't you consider making a gift to JHH to create a lasting legacy?

Making a Gift in Your Will

By simply signing your name, you have the power to make a lasting impact with end of life care in Exeter and beyond! There is no up-front cost, and your estate will benefit from the tax receipt.

Some Ways You Can Make Such a Gift:

Residual Bequest

You can determine to leave a percentage of the remainder or residue of your estate, after other bequests have been fulfilled, as a gift to be used where it's needed most in the future. This type of residual gift is popular because it keeps in line with inflation and is unlikely to lose value over time.

Specific Bequest

Another option is to set a specific amount to be gifted to JHH in either currency or gift in kind (property, collections, books, jewelry, and so on). Gifts in kind are normally sold on receipt, with the proceeds used for JHH's most urgent needs.

*See Sample Bequest and Codicil Language. Pages 4-5

Try the Sixty-Second Bequest!

It couldn't be easier to demonstrate your support of JHH than with a Sixty-Second Bequest!

By taking a minute today, you can have an enduring impact on JHH's commitment to end-of-life care. You don't even need help from lawyers or advisors (although it's always recommended that you speak with experts before making any donation). All you need is a Registered Retirement Savings Plan, a Registered Retirement Income Fund, or a Life Insurance Policy.

Here's How It Works:

Step 1

Request a Single or Multiple Beneficiary Designation Form for your Registered Retirement Savings Plan, your Registered Retirement Income Fund, or life insurance policy from your plan's administrator.

Step 2



Fill out the form and name Jessica's House Hospice as one of several, or the only, beneficiary.

Step 3

Return the form to your plan administrator.

It's that easy. In just three steps, you can make a gift to JHH that costs you nothing now. It will also fund the most urgent priorities facing JHH, and your gift will impact generations to come.

Gifts for Your Family and JHH

You can provide for your family and heirs and make a gift while supporting JHH into the future.

Life Insurance Gifts

Including JHH as a beneficiary for a policy on which you pay modest premiums means you can make a significant gift at a relatively low cost. You can assign JHH as the sole or one of the co-beneficiaries of your personal policy or the life insurance policy from an employer. Your estate will receive a tax receipt equal to the direct benefit to JHH. In this way, you create your legacy and benefit your heirs through a significant tax reduction.

A second option is to purchase a new policy, name JHH as the owner, and receive tax receipts during your lifetime for any premiums paid after the date of transfer of ownership to JHH.

More Common Gifting Opportunities

There are numerous ways that you can support JHH's important work, including:

Gifts of Stocks and Securities

A donation of securities or mutual fund shares is one of the most efficient ways to give to JHH. With a donation of securities or mutual funds, capital gains tax does not apply to any increase in value since the purchase date, allowing you to give more and avoid paying capital gains taxes. By instructing your bank to donate your securities to JHH, you may receive as much as 49% of the amount you donated back at tax time. That could mean a \$494 tax credit on \$1000 donated in a single year. You do not have to claim all of the donations you made in the year they were made. Donating over \$200 makes you eligible to carry them forward and claim them on your tax return for any of the next five years. This flexibility means that the unclaimed carry-forward portion may qualify for a larger tax deduction in the future.

*See Letter of Instruction. Pages 6-7



Memorial and Tribute Gifts

Making a memorial or tribute gift to support the work of JHH is a meaningful way to express your love, admiration, and gratitude for someone special. Your gift will honour your loved ones, create a lasting tribute to them, and make a difference in our community's future of palliative and bereavement care.

When you make a gift in your Will to JHH, you can do it in memory of or in honour of someone important to you. It will stand as your legacy and your loved one's legacy for generations.

Gifts from Donor Advised Funds

Donor-advised funds (DAFs) are one of the most convenient ways to support a cause you care about while maintaining the flexibility you desire. A DAF is a little like a personal charitable savings account. It allows you to make a charitable contribution to your DAF account, receive an immediate tax deduction, and then make gifts (recommend grants) to your favourite charities – such as Jessica's House Hospice.

Sample of Bequest Language (For A New Will)

I hereby give, devise, and bequeath [\$ _____] OR [___ % of the residue of my total estate] OR [___ all of the residue of my total estate] to Jessica's House Hospice for its charitable uses and purposes.



Sample of Codicil Language (Amendment to An Existing Will)

This is a codicil to my last will and testament.

I hereby give, devise, and bequeath [\$ _____] OR [____ % of the residue of my total estate] OR [____ all of the residue of my total estate] to Jessica's House Hospice for its charitable uses and purposes.

In all other respects, I ratify and confirm all of the provisions of my said last Will and Testament dated on the _____ day of _____, 20____.

IN WITNESS* WHEREOF, I sign, publish, and declare this instrument to be a Codicil to my last Will and Testament in the presence of the persons witnessing said Codicil at my request this _____ day of _____, 20____.

(Grantor's signature)

_____ residing at _____
(Grantor's name) (city/town, province)

Witnesses: *Note that witnesses must not be a beneficiary of the estate, must be over age 18, and must observe the Grantor sign the codicil.

(*Witness 1 signature)

_____ residing at _____
(*Witness 1 name) (city/town, province)

(*Witness 2 signature)

_____ residing at _____
(*Witness 2 name) (city/town, province)



In order to initiate your stock/securities transfer, please complete this form and send it to your broker and return a copy by fax to Jessica's House Hospice @ 519-235-0946, and to BMO Nesbitt Burns- Attn: Katelyn Jones @ 519-646- 1180.

Your broker will be able to provide certain information such as the CUSIP and FINS numbers.

Unexpected and/or unidentifiable transfers make it difficult for the Hospice to issue the appropriate tax receipt. Please contact Tracy Snell, Executive Director at (519) 235-0941 with any questions about the gift of securities transfer process.

All donated securities are sold upon receipt. The value of your charitable tax receipt is determined by the closing price of the securities on the day that the Hospice receives them into our account.

Your broker may contact Katelyn Jones or Jennifer Town at BMO Nesbitt Burns (519)646-1180 with any questions or concerns.

Thank you for supporting Jessica's House Hospice with a gift of securities.

February 2024



LETTER OF AUTHORIZATION FROM DONOR TO BROKER

A copy of this letter should be faxed to Jessica's House Hospice

Attention: Tracy Snell Fax: 519-235-0946

Broker Name _____

Broker Telephone _____

Broker E-mail _____

Re: Electronic Transfer of Securities for Charitable

Purposes Transfer from:

Account #: _____ Account Name: _____

Donor's Name: _____

Securities to be donated:

Company Name: _____ # of shares: _____

CUSIP #: _____

Transfer to:

BBS FINS # T009
 CUID/DCS: NTD
 DTC: 5043
 EUROCLEAR: 90098
 Dealer Rep: 9185-LH3

BMO Nesbitt Burns
 Contact: Katelyn Jones or Jennifer Town
 Tel: (519) 646-1180
 Fax: (519) 646-3038 or 679-8848
 E-mail: katelyn.jones@nbpcd.com
jennifer.town@nbpcd.com

For: Jessica's House Hospice Account # 440-34294-10

I authorize Jessica's House Hospice or its agent to contact my broker for purposes of concluding this transaction.

Please arrange for this transfer as expeditiously as possible. As the donor, you have permission to call me if there are any questions.

Donor/Client Information (Please complete)

Name _____

Address _____

City, Prov., Postal Code _____

Daytime Telephone _____

In Memory of _____

Date: _____

Signature: _____